Scholarship Policy and Procedure

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Version:	26.1	**Date Created:**	4 April 2019
Responsibility:	Executive Director Partnerships and Engagement	**Date Reviewed:**	25 November 2026
Approver:	Chief Executive	**Next Review Date:**	24 November 2028

1 Purpose

1.1 The purpose of the UCOL scholarship portfolio is to position financial support in a way that complements one or more of UCOL's strategic directions:

- Encourage participation of ākonga from targeted backgrounds in tertiary education by providing financial assistance;
- Promote excellence and reward merit;
- Support UCOL's stakeholder engagement by connecting community, industry, donors and philanthropic partners with UCOL and its ākonga; and
- Recognise and honour the contributions and intentions of donors who support ākonga through scholarships, including those established for specific purposes, disciplines or ākonga groups.

1.2 This policy and procedure ensures that scholarships, including those funded or supported by external donors, are consistent with UCOL's values and are effectively managed, administered, and delivered.

1.3 Where scholarships are donor-funded, any agreed conditions, eligibility criteria or intended purposes will be respected, provided these are consistent with UCOL's policies and relevant obligations.

2 Organisational Scope

2.1 This policy and procedure applies to all scholarships administered, managed, or awarded across UCOL, including those funded by UCOL, external donors, industry, community organisations and philanthropic partners.

2.2 It applies to all kaimahi involved in the establishment, approval, administration, evaluation and awarding of scholarships.

3 Roles and Responsibilities

Role:	Responsibilities:
Executive Director Partnerships and Engagement	Oversee the scholarship portfolio, approve operational arrangements within delegated authority, and receive annual reporting.
Scholarship Administrators	Responsible for the day-to-day administration and coordination of scholarships, including promoting opportunities, managing applications, checking eligibility, coordinating evaluation processes, maintaining accurate records, communicating with applicants and recipients, and arranging scholarship payments. Ensure any donor-specific conditions and reporting requirements are met.
Scholarship Evaluation Panels	Responsible for assessing eligible applications against the approved scholarship criteria, ensuring a fair, consistent and transparent evaluation process, managing any actual or perceived conflicts of interest, and making recommendations or decisions on scholarship recipients in accordance with their delegated authority. Ensure donor intentions and conditions are considered where applicable.
Finance	Verify payment documentation, process approved awards, and support financial recording and reconciliation.

4 Policy Statements

4.1 For the policy to be implemented effectively, it is imperative that processes are established in alignment with this procedure.

4.2 For procedural consistency, all relevant teams will collaborate to establish, evaluate, award, and pay all scholarship programmes, as required.

4.3 Scholarships will be awarded in accordance with published eligibility criteria and any agreed donor conditions. Recipients will be encouraged to acknowledge donors and participate in recognition activities where practicable.

4.4 UCOL will provide appropriate opportunities to celebrate scholarship recipients and recognise donors, including award ceremonies where appropriate.

5 Procedure

5.1 Collaborative/Partner or Donor Scholarships

Scholarship funds received by UCOL from external partners will be coordinated by Scholarship Administrators. Awards may be paid to recipients, credited against fees or applied to approved costs outlined in the scholarship documentation, according to documented donor conditions.

5.1.1 The Scholarship Administrators are responsible for:

a) Meeting the strategic alignment of community and industry engagement with UCOL values and the student profile.
b) Documenting the scholarship purpose, eligibility, funding, evaluation responsibilities and any donor conditions in a Donor Agreement or equivalent written record.
c) Communicating and liaising with donors in relation to scholarships, and scholarship events.
d) Promoting awareness of the scholarships and donor, with support from the Faculties, Te Mana Tauira, and the Marketing, Communications and International team.
e) Coordinating appropriate recognition strategies for donor partners.
f) Undertaking appropriate management and administration tasks, as set out in the Donor Agreement.

5.1.2 UCOL reserves the right to not accept scholarship donations from:

a) Donors who do not align with UCOL's values.
b) Organisations that set unreasonable or unrealistic conditions that may be punitive or damaging to the ākonga recipient, donor or UCOL.
c) Donor organisations associated with events or other organisations that could bring UCOL into disrepute, or affiliate with any political party.
d) Organisations, individuals or activities that discriminate against or are offensive to community groups.

5.1.3 The responsibilities of the Scholarship Administrators will vary, dependent on the details of the Donor Agreement. Key areas of responsibility will include:

a) Issuing donors with invoices, and receipts in conjunction with the Finance team, as required.
b) Administering, collating, and reviewing for completeness all applications.
c) Convene the appropriate evaluation panel or coordinate donor-led evaluation where agreed.
d) Advising the successful and unsuccessful applicants of the outcome of the scholarship review, as required.
e) Inviting donors and recipients to the annual Scholarship Award Ceremonies.
f) Managing the ongoing relationship with the stakeholders.

5.2 **Institutional Scholarships**

Institutional Scholarships are established according to the purpose of this policy and procedure, with any specific criteria detailed at the time the scholarship is established. Institutional Scholarships can be applied to the recipients' ākonga finance account with UCOL for the support of student fees and other course related costs or can be made as a bank transfer to the ākonga bank account, depending on the conditions of the scholarship.

5.2.1 New UCOL funded scholarships must be approved by the Chief Executive and provided for within the approved budget. Individual awards under an established scholarship may be approved through the relevant evaluation process and delegated authority.

5.2.2 The responsibilities of the Scholarship Administrators include:

a) Administering, collating and reviewing all applications.
b) Convening the appropriate members of the scholarship review committee.
c) Advising the successful and unsuccessful applicants of the outcome of the scholarships.
d) Inviting recipients to attend the annual Scholarship Award Ceremonies.
g) Arranging with Finance for bank transfers to be made to recipients, where this is the appropriate way to award the scholarship.

5.3 External Scholarships

5.3.1 External scholarships may be included on the Scholarships section of UCOL's website under the appropriate location and heading. Prior to being promoted on UCOL's website, sufficient due diligence should be undertaken to ensure:

a) The organisation aligns with UCOL's brand and values.
b) The organisation has links to the communities UCOL represents, or programmes UCOL delivers.
c) The organisation is not associated with events or other organisations that could bring the institute into disrepute, or affiliate the institute with any political party.
d) The scholarship is applicable to the needs of UCOL students.

5.4 Scholarship Evaluation Panel

5.4.1 Scholarship Administrators coordinate the Scholarship panel evaluation processes. Evaluation Panels will ordinarily comprise at least three members with relevant expertise, including UCOL kaimahi and, where appropriate, donors or external representatives. Agreed donor-led evaluation arrangements may be used where they remain fair and transparent. Panel members must declare and appropriately manage actual or perceived conflicts of interest.

5.5 Application Process

5.5.1 The Scholarship Administrators are responsible for:

a) The development and implementation of a scholarship application process to best fit the needs of the applicants, donors and recipients, and aligned with funding guidelines.
b) Facilitating the application process within timeframes that are collaboratively determined to meet the needs of the student, and donor, within key dates in the academic calendar.
c) Ensuring scholarship applications are administered in accordance with the UCOL Privacy Policy and Privacy Procedure.

d) Acknowledging receipt of all scholarship applications and communicating the final evaluation panel outcomes.

5.6 Eligibility Checks

5.6.1 The Scholarship Administrators are responsible for conducting preliminary checks of each scholarship application in accordance with the scholarship eligibility criteria. The quality and content of a scholarship application is the responsibility of the applicant.

5.7 Scholarship Evaluation Process

5.7.1 The scholarship evaluation process must be transparent and ethical and follow the below process:

a) Records on all decisions made throughout the evaluation process must be appropriately kept.
b) The Scholarship Administrators are responsible for the initial review to ensure applications are complete and applicants are eligible for the scholarship.
c) Selection of scholarship recipients is based on a competitive application process that contains written application, unless otherwise specified in the terms of the scholarship.
d) An evaluation panel with appropriate expertise will assess eligible applications against the approved criteria. Scholarship Administrators will provide suitable guidance and maintain a record of the assessment and decision.
e) Scholarship Administrators will convene the panel or coordinate agreed donor-led selection.
f) Scholarship Administrators will advise applicants of outcomes as soon as practicable, normally within three months of the closing date.

5.8 Financial Management and Reporting

5.8.1 Scholarship Administrators will maintain a central record of scholarship funding sources, agreed conditions, awards, recipients and payments. Finance will process payments only with documented approval and in accordance with UCOL financial policies and delegations.

5.8.2 Donor funds will be used for their agreed purpose. Where no suitable recipient is identified, unawarded funds will be managed in accordance with donor conditions and any applicable agreement.

5.8.3 An annual consolidated summary of awards, expenditure, funding sources and recipient outcomes will be provided to the Executive Director Partnerships and Engagement. Material issues or unmet donor obligations will be escalated promptly.

5.9 **Ongoing Eligibility**

5.9.1 Where an award has ongoing conditions, the relevant UCOL team will monitor continued eligibility. Any concerns will be reviewed against the scholarship terms before further payments are made.

6 References

Internal • Privacy Policy • Privacy Procedure • Delegations Policy • Conflict of Interest Policy • Conflict of Interest Procedure • Recordkeeping Policy and Procedure
External • Education and Training Act 2020 • Privacy Act 2020 • Charities Act 2005

Document Version History

Version	Effective Date	Created/Reviewed By	Reason for review
26.1	25 November 2026	Chief Executive	Cyclical review. Updates made to reflect current processes.
22.1	8 February 2022	Scholarship Administrator	Cyclical review. Updates to process.
19.1	4 April 2019	General Manager Operations	New document.